

David Lloyd
— CLUBS —

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Sales Manager and Sales Consultant

GDRP Responsibilities and Process

The General Data Protection Regulation (GDPR) is the biggest change in data protection laws for 20 years and gives European citizens control over their personal data. It's good news for individuals, but presents complex problems for companies. They could face fines of up to £20 million or 4% of annual turnover if they breach the new directive. With this in mind, there are some key rules to remember:

- Tell people what you are doing with their data
- Know what data you have, and why you have it
- Destroy what you don't need
- Manage data in a structured way
- Safely retain all necessary personal data
- Know who is responsible for each data process
- Document and audit each data process
- Encrypt what you wouldn't want to be disclosed
- Create a security aware culture
- Educate all team members on how to process data
- Be prepared – expect the best but prepare for the worst

This document details the responsibilities of Sales Managers & Sales Consultants, that will ensure that each of our Sales process are GDPR compliant. It is the responsibility of the Sales Manager and Sales Team to understand and follow the sales processes as detailed in the framework below.

GUEST REGISTRATION CARDS



SALES MANAGER (SM)	<p>All guests should complete the Guest Registration form using the Club tablet, but on the occasion where this is not available or not working and a paper Guest Registration Card is completed, the following steps should be followed:</p> <ul style="list-style-type: none"> • If a guest has ticked to say they are interested in membership, the paper guest registration form needs to be filed securely by date. <ul style="list-style-type: none"> • Guest Registration Forms to be stored in boxes clearly labelled by year, so that all Guest Forms from the same year are stored together. • Boxes containing Guest Registration Forms should be stored in an office that is locked when not in use. • After 4 years, paper Guest Registration Forms must be securely destroyed. Sales managers will need to collate all paper guest registration forms from 4 years prior, ready for collection to be shredded. • If the guest is not interested in membership, the Sales Manager can add this form to the collection of paperwork to be shredded the following day, unless the guest has had an accident in the club, in which case the Duty Manager will need to upload the guest's details onto prime safety and the form will need to be filed securely, along with the accident/incident form and kept for 12 months.
SALES CONSULTANT (SC)	<ul style="list-style-type: none"> • If a guest ticks to say they are interested in membership and has completed a paper copy of the Guest Registration Card, their details need to be entered into club centric, including their marketing preferences. • A guest who has ticked to say they are interested in membership via the tablet or paper Guest Registration Card can be contacted regarding their membership enquiry. The corresponding activity should be cleared on Club Centric and notes added to the prospect's record. • If required, future activity should be scheduled against the prospect's record on CC.

INCOMING CALL

SM & SC

- After speaking with the prospect, their details will need to be added to Club Centric.
- No Marketing Preferences have been captured at this point, so Sales Teams will need to ensure that the prospect has been opted out of all marketing on Club Centric.

WEBSITE ENQUIRY FORM



SM & SC

- Once all details have been entered/automatically uploaded into Club Centric, the enquiry should be deleted from the Sales inbox and all paper copies securely destroyed.
- **The record must be updated to reflect the marketing preferences selected by the prospect in the Web Form.**

MEMBER REFERRAL



SM & SC

Where a member has given their friend's details to the Sales Team in person and not via the app:

- When contacting the lead for the first time, the SC should explain how they obtained their details and ask them to confirm if they would like to enquire into membership and continue the call, or terminate the call and not be contacted again.
- Only once the Sales Team have spoken with the lead and they have confirmed they are happy to enquire into membership, should their details be loaded onto Club Centric.
- Whilst attempting to contact the lead, the email or paper based copy should be saved in an email folder, or stored securely for up to 14 days (in an office that can be locked when not in use). If after 14 days the SC has not been able to reach the lead, the data should be securely destroyed.
- No Marketing Preferences have been captured at this point, so Sales Teams will need to ensure that the prospect has been opted out of all marketing.
- Once details have been entered into Club Centric, all paper copies and emails should be securely destroyed (shredded/deleted).

GETTING TO KNOW YOU FORM



SM	<p>All Prospects should complete the GTKY form using the Club tablet, but on the occasion where this is not available or not working and a paper GTKY form is completed, the following steps should be followed:</p> <ul style="list-style-type: none"> If a prospect does not join following a tour, once their details have been loaded onto ClubCentric, the GTKY Form will need to be filed securely for 4 years by date. <ul style="list-style-type: none"> GTKY Forms to be stored in boxes clearly labelled by year, so that all GTKY Forms from the same year are stored together. Boxes containing GTKY Forms should be stored in an office that is locked when not in use. After 4 years, paper GTKY Forms must be securely destroyed. Sales Managers will need to collate all Paper GTKY Forms from 4 years prior, ready for collection to be shredded.
SM & SC	<p>When the prospect completes the GTKY form on the Club tablet:</p> <ul style="list-style-type: none"> After the Club tour, the Sales Consultant should update an existing record or create a new record in ClubCentric using the Prospect's details, including the marketing preferences. The Prospect's details will have been sent to the Sales inbox. Once the Prospect's details have been added to Club Centric, the details should be deleted from the Sales inbox. <p>If completing a paper copy of the GTKY form:</p> <ul style="list-style-type: none"> If the mail preferences have not been completed, the SC should prompt the prospects to complete this section of the GTKY form. After the Club tour, the Sales Consultant should update an existing record or create a new record in ClubCentric, using the prospect's details on the GTKY Form, as well as updating the marketing preferences. If the Prospect joins, the GTKY Form should be attached to the Membership Application Form and filed securely (if having to use paper copies).

THE JOINING PROCESS



SM & SC	<ul style="list-style-type: none"> All Prospects should complete the sign up process using the Club tablet, but on the occasion where this is not available or not working, the Prospect should be sent the unique url from their Club Centric record, enabling them to join and pay via the online journey. Should this process also not be working, then the Prospect should be sent the acquisition link https://www.davidlloyd.co.uk/forms/acquisition/join-online for them to complete. A form needs to be completed per adult and must be received from the Primary member before the membership can be processed. This will ensure our new member is agreeing to the terms & conditions, direct debit guarantee, health declaration and marketing preferences. When using the acquisition link: <ul style="list-style-type: none"> The Prospect details should be entered straight into Club Centric. The Marketing Preferences on the Membership Application Form will supersede any Marketing Preferences on any form previously completed (Guest Registration Form and/or GTKY Form). It is important to make sure these are uploaded correctly onto Club Centric. If payment is made by credit card: <ul style="list-style-type: none"> Card holder must give their authorisation. Card details must never be written down. A copy of the transaction slip must be given to the card holder at the earliest opportunity - until that time the slip must be attached to the application form and securely filed. Any corporate and/or age proof that is sent via email must be attached to the new Member's Club Centric record and deleted from the sales inbox straight away.
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TELEPHONE SALES



SM & SC

- Sales person sends the Prospect the unique url from their Club Centric record, enabling them to join and pay via the online journey. On the occasion that this process is not working, the Sales person should send the Prospect the acquisition link <https://www.davidlloyd.co.uk/forms/acquisition/join-online> for them to complete whilst staying on the phone. A form needs to be completed per adult and must be received from the Primary member before the membership can be processed. This will ensure our new member is agreeing to the terms & conditions, direct debit guarantee, health declaration and marketing preferences.
- When using the acquisition link:
 - The Prospect details should be taken over the phone and entered straight into Club Centric.
 - Card details (long card number, expiry date and 3 digit security code.) should never be written down. Payment for Joining Fee, Pro-Rata and the next month's fees (where required), should be run through the PDQ machine whilst on the phone to the prospect.
- The Marketing Preferences on the Membership Application Form will supersede any Marketing Preferences on any form previously completed (Guest Registration Form and/or GTKY Form). It is important to make sure these are uploaded correctly onto Club Centric.
- Any corporate and/or age proof that is sent via email must be attached to the new Member's Club Centric record and deleted from the sales inbox straight away.

GYM FLEX & DL FLEX



SM & SC

- Gym Flex & DL Flex NMS & renewals will now be documented by Region. Once notified that all new Gym Flex & DL Flex sales have been processed, Sales Teams will be able to access the Excel document, containing the new Gym Flex and DL Flex members, from within their Region's folder on the S Drive:
`S:\001-DataSharing\<RegionName>\001-AllClubs`
- Sales Teams should not save a copy of the file to any other folders or Drives. All printouts should also be securely destroyed.
- Flex Member to complete Membership paperwork in Club.
- Responsible for highlighting the soft opt in on the Membership Application Form and updating the new member's marketing preferences on Club Centric.

SM

- Salesperson sends <https://www.davidlloyd.co.uk/forms/acquisition/join-online> to new Gym Flex Member for them to complete on their first visit to the Club. A form needs to be completed per adult. This will ensure our new member is agreeing to the terms & conditions, direct debit guarantee, health declaration and marketing preferences.
- Paper version of addendum form for Flex members should be signed and then attached to the Member's CC record. Once uploaded to CC, paper copy can be securely destroyed.

CORPORATE SCHEMES (Applicable at certain Clubs only)



SM & SC

- Clubs can access the document, containing the employees' (new members') details from within the following folder:
`S: Drive (S:\001-DataSharing\<RegionName>\<clubname>`
- Sales Teams should not save a copy of the file to any other Folders Drives. All printouts should also be securely destroyed.
- If creating the Member's record prior to the Member visiting the Club, they should be opted out of all marketing preferences on Club Centric, until they complete the acquisition link.

	<ul style="list-style-type: none"> Responsible for updating the new member's marketing preferences on Club Centric.
SM	<ul style="list-style-type: none"> Salesperson sends https://www.davidlloyd.co.uk/forms/acquisition/join-online to new Member for them to complete. A form needs to be completed per adult. This will ensure our new member is agreeing to the terms& conditions, direct debit guarantee, health declaration and marketing preferences.

GENERAL

SM	<ul style="list-style-type: none"> Responsible for training Sales Team Members on the above Sales Processes. This also includes new starters. Responsible for checking the above processes are being followed and adhered to by all Sales Team Members. Responsible for checking that marketing preferences are being recorded correctly on Club Centric and as per the lead's/prospect's/member's request. <ul style="list-style-type: none"> This is important as allows us to market to leads/prospects/correctly. Adhere to the Line Manager responsibilities as detailed in the GDPR training material.
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A digitally signed copy of this document will be kept in each Team Member's Personnel file